

Substitute for form 1449A/PTO INFORMATION DISCLOSURE STATEMENT BY APPLICANT <i>(use as many sheets as necessary)</i>				Complete if Known	
				Application Number	09/704,838
				Filing or 371(c) Date	11-01-2000
				First Named Inventor	Ronald Sloan
				Art Unit	3628
				Examiner Name	Kirsten Sachwitz Apple
Sheet	1	of	1	Attorney Docket Number	60021-375901

U.S. PATENT DOCUMENTS				
Examiner Initials*	Cite No. ¹	Document Number	Issue Date MM-DD-YYYY	Name of Patentee or Applicant of Cited Document
		Number - Kind Code ² (if known)		
TD		US-4,953,085	08-28-1990	Atkins, Charles A.

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Examiner Initials*	Cite No. ¹	Foreign Patent Document	Publication Date MM-DD-YYYY	Name of Patentee or Applicant of Cited Document	T ⁴
		Country Code ³ -Number ² -Kind Code ² (if known)			

NON PATENT LITERATURE DOCUMENTS			
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Examiner Signature <i>Kirsten Apple</i>			Date Considered 7/23/00

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Sheet	5	of	1
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Complete if Known

Application Number | 09/704,838

Filing Date	November 1, 2000
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First Named Inventor	Stephen B. Slutsky
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Art Unit	3628
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Examiner Name	Paul A. Bell
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Attorney Docket Number	60021-375901
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Examiner Initials	Cite No. ¹	Document Number Number-Kind Code ² (if known)	Issue Date MM-DD-YYYY	Name of Patentee or Applicant of Cited Document
ZA	1	US-6,430,542	08-2002	Moran, William J.
ZA	2	US-5,918,217	06-1999	Maggioncalda et al.
ZA	3	US-5,819,263	10-1998	Bromley et al.
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ZL	1	"Personal financial software", The CPA Journal, New York, September 1999, Vol.69, Iss.9; pg 40, 7 pgs, Proquest, describes numbers of software packages on the market for providing automated coaching for a financial modeling.	
	2		

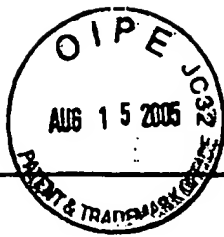
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				First Named Inventor	RONALD SLOAN
				Art Unit	3628
				Examiner Name	Kirsten Sachwitz Apple
Sheet	1	of	1	Attorney Docket Number	060021-375901

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Examiner Initials ¹	Cite No. ¹	Document Number	Issue Date MM-DD-YYYY	Name of Patentee or Applicant of Cited Document
		Number - Kind Code ² (if known)		
[Signature]		US-6,327,586	12-4-2001	Kisiel, Kenneth W.
		US-2001/0039493 A1	11-8-2001	Pustejovsky et al.
		US-2002/0161928 A1	10-31-2002	Ndili, Awele

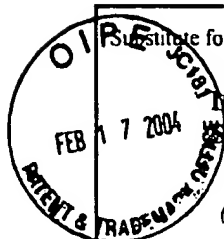
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Examiner Signature [Signature]			Date Considered 3/3/00

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				First Named Inventor	Sloan, Ronald E.
				Art Unit	3628
				Examiner Name	Kanof, Pedro R.
Sheet	1	of	3	Attorney Docket Number	60021-375901

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	2	5,729,700	03-1998	Melnikoff, Meyer	
	3	5,806,049	09-1998	Petruzzi, Christopher R.	
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	6	5,893,079	04-1999	Cwenar, Daniel	
	7	5,930,774	07-1999	Chennault, William C.	
	8	5,963,925	10-1999	Kolling et al.	
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Examiner Signature				Date Considered 3/3/06	

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of

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First Named Inventor

Sloan, Ronald E.

Art Unit

3628

Examiner Name

Kanof, Pedro R.

Attorney Docket Number

60021-375901

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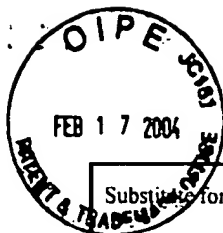
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ZA	24	JP410093729A		09-1996	Yoshikawa	
ZA	25	JP2000163030A		06-2000	HITA	
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Examiner Initials	Cite No. ¹	Include name of the author (in CAPITAL LETTERS), title of the article (when appropriate), title of the item (book, magazine, journal, serial, symposium, catalog, etc.), date, page(s), volume-issue number(s), publisher, city and/or country where published				T ²
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